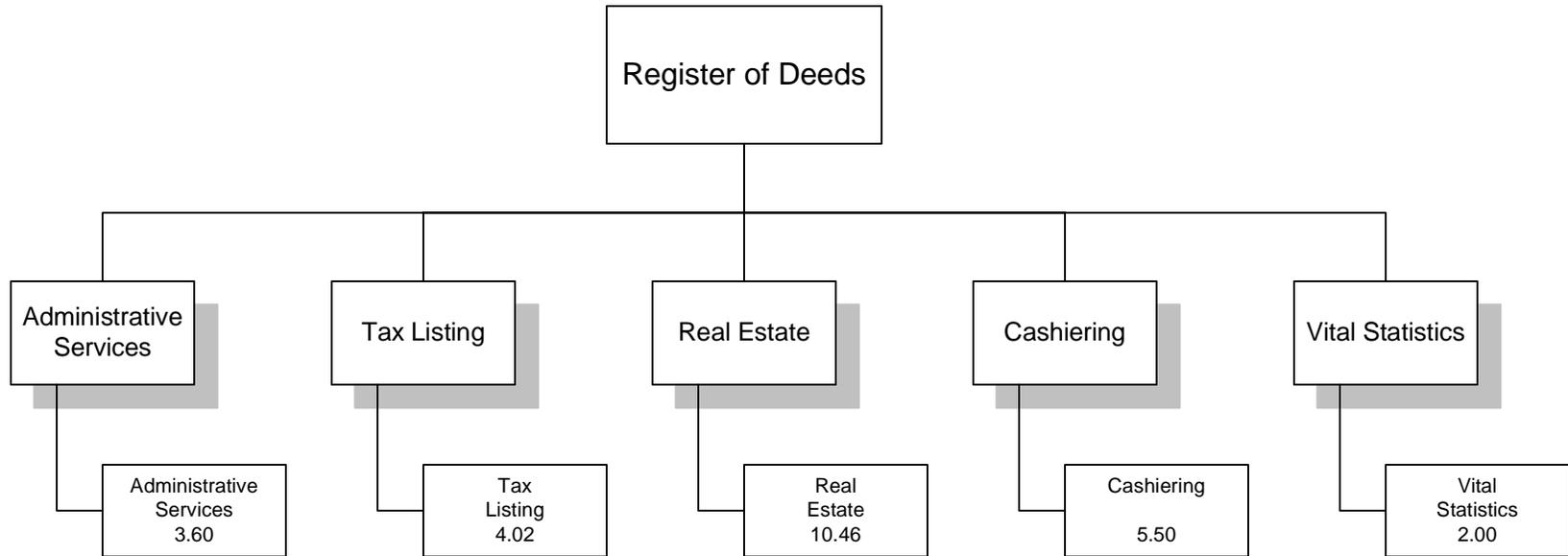


REGISTER OF DEEDS OFFICE

FUNCTION / PROGRAM CHART



25.58 TOTAL FTES

1. Position counts stated in terms of budgeted full time equivalent positions (FTE) includes extra help and overtime.
2. See Stats/Trends Section for position detail.

Statement of Purpose

The purpose of the Register of Deeds office is to provide to the citizens of Waukesha County:

1. A depository for safekeeping and public inspection of all legal documents pertaining to Real Estate and Vital Statistics.
2. Analyze and create accurate ownership and descriptions of parcels in Waukesha County to aid assessors in local municipalities.

| Financial Summary | 2007 Actual | 2008 Adopted Budget | 2008 Estimate (c) | 2009 Budget | Change From 2008 Adopted Budget | |
|------------------------------------|----------------------|---------------------------|----------------------|----------------------|------------------------------------|--------------|
| | | | | | \$ | % |
| General Government | \$0 | \$0 | \$0 | \$0 | \$0 | NA |
| Fine/Licenses | \$0 | \$0 | \$0 | \$0 | \$0 | NA |
| Charges for Service | \$3,140,071 | \$3,625,945 | \$3,466,040 | \$3,638,540 | \$12,595 | 0.3% |
| Interdepartmental | \$0 | \$0 | \$0 | \$0 | \$0 | NA |
| Other Revenue | \$10 | \$0 | \$0 | \$0 | \$0 | NA |
| Appr. Fund Balance | \$0 | \$0 | \$0 | \$0 | \$0 | NA |
| County Tax Levy (Credit)(a) | (\$1,520,341) | (\$1,659,833) | (\$1,659,833) | (\$1,736,393) | (\$76,560) | 4.6% |
| Total Revenues Sources | \$1,619,740 | \$1,966,112 | \$1,806,207 | \$1,902,147 | (\$63,965) | -3.3% |
| Personnel Costs (b) | \$1,309,799 | \$1,443,681 | \$1,365,755 | \$1,421,101 | (\$22,580) | -1.6% |
| Operating Expenses | \$67,570 | \$118,736 | \$112,347 | \$98,881 | (\$19,855) | -16.7% |
| Interdept. Charges | \$306,986 | \$403,695 | \$345,478 | \$382,165 | (\$21,530) | -5.3% |
| Fixed Assets | \$0 | \$0 | \$0 | \$0 | \$0 | NA |
| Total Expenditures | \$1,684,355 | \$1,966,112 | \$1,823,580 | \$1,902,147 | (\$63,965) | -3.3% |
| Rev. Over (Under) Exp. | (\$64,615) | - | (\$17,373) | - | - | NA |

Position Summary (FTE)

| | | | | | |
|-----------------------|--------------|--------------|--------------|--------------|---------------|
| Regular Positions (b) | 26.00 | 26.00 | 25.00 | 25.00 | (1.00) |
| Extra Help | 0.00 | 0.28 | 0.28 | 0.28 | 0.00 |
| Overtime | 0.00 | 0.30 | 0.30 | 0.30 | 0.00 |
| Total | 26.00 | 26.58 | 25.58 | 25.58 | (1.00) |

- (a) The Tax Levy credit amount is from revenues in excess of expenditures, which is used to reduce Tax Levy funding for other general government operations.
- (b) In 2009 the Register of Deeds Department is unfunding 1.00 FTE Clerk Typist II position due to the soft real estate market.
- (c) The Department is estimating that they will finish unfavorably in 2008 due to the soft real estate market affecting revenue receipts.

Major Departmental Strategic Outcomes and Objectives for 2009

County-Wide Key Strategic Outcome: An economically vibrant county

Objective 1: Promote Real Estate and other local business by minimizing risk and turn around time involved in property transactions processed by the Register of Deeds. (Real Estate and Cashiering)

Key Outcome Indicator: The Real Estate Division strives to minimize the time between submission of a document and its availability for public inspection and distribution to affected parties. The Division's benchmark for making documents available to the public is 8 business days, and the benchmark for distributing documents is 30 calendar days. In light of the anticipated implementation of new Land Records System software in 2008-2009, the ROD benchmarks will remain at the current levels for the next budget year.

| Performance Measure: | 2007 Actual | 2008 Target | 2008 Estimate | 2009 Target |
|---|----------------|----------------|------------------|----------------|
| # of days when a document is recorded after the benchmark of 8 business days | 0 | 5 or less * | 0 | 0 |
| # of days when a document is mailed out after the benchmark of 30 calendar days | 0 | 0 | 0 | 0 |

* Benchmark reduced from 10 to 8 days for 2008

County-Wide Key Strategic Outcome: Cost effective services delivered with competence and skill

Objective 2: Provide desired services to clients efficiently. (Administrative Services)

Key Outcome Indicator: Increase in use of online services should logically indicate a commensurate decrease in counter requests. Measurement of monthly average pay-per-view internet site access may provide an indicator of reduced counter and Real Estate division help line calls.

| Performance Measure: | 2007 Actual | 2008 Target | 2008 Estimate | 2009 Target |
|---------------------------------|----------------|----------------|------------------|----------------|
| Total transactions via internet | 1,359 | 1,200 | 1,566 | 1,800 |
| Walk-in help requests | 6,562 | 7,400 | 6,400 | 6,000 |
| Phone in help requests | 6,877 | 6,856 | 6,400 | 6,000 |

County-Wide Key Strategic Outcome: A county that provides customers with quality programs and services

Objective 3: Provide constituents with an irrefutable, reasonably accessible record of births, marriages and deaths within Waukesha County. The majority of interaction with constituents taking place in the Register of Deeds Office occurs at the Vital Records counter. (Vital Statistics)

Key Outcome Indicator: Percent of positive responses to customer survey. Positive feedback regarding interaction with employees and use of the self-service Vital Records station is an indication of quality and facility of service. The Department began surveying walk-in customers in the Vital Records area in mid-2006.

| Performance Measure: | 2007 Actual | 2008 Target | 2008 Estimate | 2009 Target |
|--------------------------------|----------------|----------------|------------------|----------------|
| % Positive responses to survey | 96% | 95% | 97% | 97% |

County-Wide Key Strategic Outcome: Cost effective services delivered with competence and skill

Objective 4: Provide desired services to clients efficiently. (Real Estate and Cashiering)

Key Outcome Indicator: Replace the in-house developed land records system (LRS) (tract index replacement) with an off-the-shelf product that would be supported by the vendor.

| Performance Measure: | 2007 Actual | 2008 Target | 2008 Estimate | 2009 Target |
|---|----------------|----------------|------------------|-------------------|
| Time it takes to complete the indexing process and make the document available to the public. The current benchmark is 8 days which the department achieved 100% in 2007. | 8 days | 8 days | 8 days | Less than 8 days* |
| Staff time savings using the new system. | N/A | N/A | N/A | TBD |

* This is an estimate as the software product has not yet been selected.

Current and Proposed Capital Projects

| Proj. # | Project Name | Expected Completion Year | Total Project Cost | Est. % Complete End of '08 | Estimated Operating Impact | A=Annual T=One-Time |
|---------|-----------------------------|--------------------------|--------------------|----------------------------|----------------------------|---------------------|
| 200205 | Tax Records Replacement (a) | 2009 | \$900,000 | 95% | \$22,000 | A |
| 200414 | Countywide Cashiering (b) | 2009 | \$970,000 | 30% | \$43,250 | A |
| 200622 | Tract Index Replacement(c) | 2009 | \$275,000 | 50% | \$45,000 | A |

Refer to Capital Project section of the budget book for additional detail.

- (a) Project is coordinated by Department of Administration Information Technology Division. Annual ongoing costs including software and licensing costs will be split evenly between the Register of Deed's Office (\$11,000) and the Treasurer's Office (\$11,000).
- (b) Project is coordinated by Department of Administration Business Office. Estimated Operating costs reflect annual countywide costs.
- (c) Project sponsored by Register of Deeds. A Request for Proposal (RFP) will be completed in 2008 with project implementation planned for 2009.

Administrative Services

County-Wide Key Strategic Outcome: Cost effective services delivered with competence and skill

Program Description

Administrative Services is responsible for coordinating and providing efficient administrative support to the department, including management of the office, working on business continuity, strategic planning, accounting and annual budget preparation. Fees are collected for the transfer of real estate based on the value of the property, with certain statutory exceptions. The County's portion of the fee (20%) is allocated to this program and the balance is sent to the State on a monthly basis.

| | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|------------------------------------|----------------------|----------------------|----------------------|----------------------|------------------|
| Staffing (FTE) | 3.60 | 3.60 | 3.60 | 3.60 | 0.00 |
| Charges for Services | \$1,770,219 | \$2,008,145 | \$2,008,140 | \$2,008,140 | (\$5) |
| Other Revenue | \$10 | \$0 | \$0 | \$0 | \$0 |
| Appr. Fund Balance | \$0 | \$0 | \$0 | \$0 | \$0 |
| County Tax Levy (Credit)(a) | (\$1,503,937) | (\$1,640,248) | (\$1,640,248) | (\$1,648,243) | (\$7,995) |
| Total Revenues | \$266,292 | \$367,897 | \$367,892 | \$359,897 | (\$8,000) |
| Personnel Costs | \$296,128 | \$310,692 | \$301,153 | \$310,043 | (\$649) |
| Operating Expenses | \$21,965 | \$38,497 | \$32,570 | \$30,720 | (\$7,777) |
| Interdept. Charges | \$21,743 | \$18,708 | \$18,563 | \$19,134 | \$426 |
| Fixed Assets | \$0 | \$0 | \$0 | \$0 | \$0 |
| Total Expenditures | \$339,836 | \$367,897 | \$352,286 | \$359,897 | (\$8,000) |

| | | | | | |
|------------------------|------------|---|----------|---|---|
| Rev. Over (Under) Exp. | (\$73,544) | - | \$15,606 | - | - |
|------------------------|------------|---|----------|---|---|

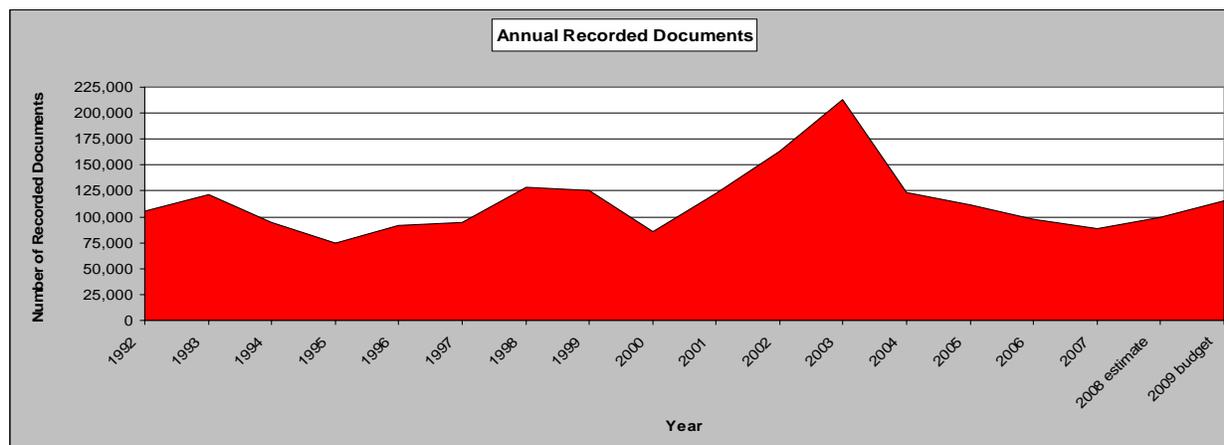
(a) Revenues in excess of expenditures are used to offset Tax Levy funding required for other county general fund operations.



Program Highlights

Charges for Service revenue of \$2.0 million from Real Estate transaction fees continues at the 2008 budgeted level due to recent softness in property values and activity. Under current State statute, the County retains 20% of the total real estate transfer fees collected, budgeted for 2009 at \$2.0 million. The State Department of Revenue retains the remaining 80%, estimated at \$8.0 million. The tax levy credit in this program area increases by \$7,995 mainly due to reduced expenditures.

Personnel costs decrease by \$649 due to cost to continue 3.60 FTE employees more than offset by an employee's decision to switch from family to single health insurance coverage which is at lower cost. Operating expenses decrease by \$7,777 to \$30,720 due to \$4,505 reduction in office supplies; \$1,914 reduction in travel and training; and \$1,000 reduction in equipment maintenance based on past spending experience.



Real Estate

County-Wide Key Strategic Outcome: An economically vibrant county

Program Description

Real estate is responsible for the indexing of all deeds, mortgages, plats, instruments and certified survey maps, writings and filing of certain other documents. Real estate is also responsible for preparing and delivering, upon receipt of the proper fee, certified copies of any record, file, map, or plat in the office.

| | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|------------------------------------|--------------------|--------------------|--------------------|--------------------|-------------------|
| Staffing (FTE) | 10.00 | 10.46 | 10.46 | 10.46 | 0.00 |
| Charges for Services | \$1,169,281 | \$1,421,900 | \$1,256,900 | \$1,427,900 | \$6,000 |
| Appr. Fund Balance | \$0 | \$0 | \$0 | \$0 | \$0 |
| County Tax Levy (Credit)(a) | (\$581,644) | (\$598,634) | (\$598,634) | (\$624,620) | (\$25,986) |
| Total Revenues | \$587,637 | \$823,266 | \$658,266 | \$803,280 | (\$19,986) |
| Personnel Costs | \$437,779 | \$455,617 | \$450,409 | \$471,171 | \$15,554 |
| Operating Expenses | \$33,108 | \$36,166 | \$36,480 | \$31,030 | (\$5,136) |
| Interdept. Charges | \$238,526 | \$331,483 | \$273,771 | \$301,079 | (\$30,404) |
| Fixed Asset | \$0 | \$0 | \$0 | \$0 | \$0 |
| Total Expenditures | \$709,413 | \$823,266 | \$760,660 | \$803,280 | (\$19,986) |

| | | | | | |
|------------------------|-------------|---|-------------|---|---|
| Rev. Over (Under) Exp. | (\$121,776) | - | (\$102,394) | - | - |
|------------------------|-------------|---|-------------|---|---|

(a) Revenues in excess of expenditures are used to offset Tax Levy funding required for other county general fund operations.



Program Highlights

Charges for Service revenue for this program increases by \$6,000 or less than 1%, due primarily to an increase in projected revenue collected through online document access based on current and previous year activity. Pay-Per-View document access fee revenues are budgeted at approximately \$2,300 per month in 2009 which is in line with actual receipts in 2007. Subscriptions for unlimited remote access to documents are budgeted at \$18,900 for 2009 which is slightly less than actual revenue received in 2007. Document recording revenue of approximately \$1.3 million remains at the 2008 budgeted level of documents estimated at 115,000. The tax levy credit in this program area increases by \$25,986 mainly due to reduced expenditures.

Personnel costs increase by \$15,554, reflecting cost to continue 10.46 FTE. Operating expenses decrease by \$5,136 to \$31,030 due to \$5,000 reduction in office equipment maintenance due to return on investment cost savings from the large format laser printer purchased in 2006 and \$1,510 reduction in outside purchased printing services. Interdepartmental charges decrease by \$30,404 to \$301,079 and reflect a \$17,657 reduction in imaging costs to \$208,193 related to reduced number of total pages expected to be imaged for 2009 for 115,000 documents or approximately 540,500 pages as well as \$16,634 reduction in postage costs budgeted at \$42,180 to bring the budget in line with actual 2007 and year to date 2008 expenditure levels.

Cashiering

County-Wide Key Strategic Outcome: An economically vibrant county

Program Description

Cashiering examines all legal documents to assure conformity to state statutes, advises the public of procedures for probate of an estate held in joint tenancy, and advises the public on laws and regulations concerning statutory requirements of the Register of Deeds Office. Cashiering collects and deposits the fees for recording and copies of recorded documents, uniform commercial code real estate-related recordings, Federal Tax Lien filings, marriage certificates, birth certificates, death certificates and real estate transfers. In addition, Cashiering staff prepares the recorded documents for imaging by Records Management and returns those documents to the customer.

| | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|---------------------------|------------------|------------------|------------------|------------------|-------------------|
| Staffing (FTE) | 6.40 | 6.50 | 5.50 | 5.50 | (1.00) |
| County Tax Levy | \$376,994 | \$385,403 | \$385,403 | \$334,240 | (\$51,163) |
| Total Revenues | \$376,994 | \$385,403 | \$385,403 | \$334,240 | (\$51,163) |
| Personnel Costs | \$260,771 | \$341,174 | \$277,076 | \$289,278 | (\$51,896) |
| Operating Expenses | \$6,286 | \$22,407 | \$21,410 | \$15,350 | (\$7,057) |
| Interdept. Charges | \$19,354 | \$21,822 | \$21,562 | \$29,612 | \$7,790 |
| Total Expenditures | \$286,411 | \$385,403 | \$320,048 | \$334,240 | (\$51,163) |

| | | | | | |
|------------------------|----------|---|----------|---|---|
| Rev. Over (Under) Exp. | \$90,583 | - | \$65,355 | - | - |
|------------------------|----------|---|----------|---|---|



Program Highlights

County Tax Levy of \$334,240 decreases by \$51,163 for this program due to the following expenditure appropriation decreases.

Personnel costs decrease by \$51,896 reflecting cost to continue for 5.50 FTE employees which is a reduction of a current vacant 1.00 FTE clerk typist II position resulting in \$52,144 in employee salary and benefit cost savings. The personnel cost to continue also reflects an employee's decision to switch from single health insurance plan coverage to no County health insurance coverage.

Operating expenses decrease by \$7,057 to \$15,350. The decrease includes \$5,500 decrease in software maintenance which was budgeted in the past to address potential cashiering system maintenance which will no longer be needed. The department is also reducing office supplies by \$700 to bring that account in line with past expenditure levels and reducing computer hardware fees in this program by \$560 to more properly budget for an expense in the Real Estate program area.

Interdepartmental charges increase by \$7,790 to \$29,612, which is mainly due to the re-allocation of the End User Technology Fund (EUTF) computer charges among the Register of Deeds program areas. Tax levy is being shifted from the End User Technology Fund to user departments' budget to cover the phasing in of full cost allocations from the new charging methods, as recommended by Internal Audit for expenditure charge increases above 3%.



| Activity | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|--|----------------|----------------|------------------|----------------|------------------|
| Subdivision Plats, Certified Survey Maps, Condo Plats Examined and Cashiered | 297 | 300 | 300 | 300 | 0 |
| Revenues & Fees Collected (County & State combined) | \$10,788,353 | \$13,100,000 | \$12,835,000 | \$13,100,000 | \$0 |

Tax Listing

County-Wide Key Strategic Outcome: A well-planned county

Program Description

Tax Listing creates and maintains the accuracy of lists and descriptions of all parcels of real estate in the county that are subject to tax and also those exempt from tax. Tax Listing provides lists, maps, and descriptions of such parcels to the public. In addition, Tax Listing is responsible for all coordination and transmission of tax listing file information in response to municipal requests.

| | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|---------------------------|------------------|------------------|------------------|------------------|------------------|
| Staffing (FTE) | 4.00 | 4.02 | 4.02 | 4.02 | 0.00 |
| Charges for Services | \$14,543 | \$10,900 | \$13,000 | \$14,500 | \$3,600 |
| County Tax Levy | \$244,592 | \$261,824 | \$261,824 | \$270,589 | \$8,765 |
| Total Revenues | \$259,135 | \$272,724 | \$274,824 | \$285,089 | \$12,365 |
| Personnel Costs | \$225,453 | \$241,819 | \$243,766 | \$253,634 | \$11,815 |
| Operating Expenses | \$2,074 | \$16,490 | \$14,935 | \$15,036 | (\$1,454) |
| Interdept. Charges | \$12,450 | \$14,415 | \$14,321 | \$16,419 | \$2,004 |
| Total Expenditures | \$239,977 | \$272,724 | \$273,022 | \$285,089 | \$12,365 |
| Rev. Over (Under) Exp. | \$19,158 | - | \$1,802 | - | - |



Program Highlights

Charges for Service revenue increases slightly by \$3,600 to \$14,500 due to recent revenue levels achieved by the department for mailing out notice of assessments for municipalities. County Tax Levy increases in the Tax Listing program by \$8,765 to cover increases in cost to continue indicated below.

Personnel costs increase by \$11,815, reflecting cost to continue for 4.02 FTE staff. The increase consists primarily of normal step and merit increases as well as increases in health insurance costs. Operating expenses decrease by \$1,454 to \$15,036 due to \$1,671 reduction in office supplies to bring that account in line with past expenditure levels. Interdepartmental charges increase \$2,004 to \$16,419 mainly due to tax levy being shifted from the End User Technology Fund to user departments' budget to cover the phasing in of full cost allocations from the new charging methods, as recommended by Internal Audit for expenditure charge increases above 3%.



| Activity | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|--|----------------|----------------|------------------|----------------|------------------|
| Real Estate & Personal Property Accounts maintained by Tax Listing | 97,374 | 99,000 | 98,000 | 99,000 | 0 |
| Number of tax listings updated by Tax Listing staff* | 76,696 | 43,000 | 80,000 | 41,000** | (2,000) |
| Number of Property Transfers Processed | 11,346 | 12,000 | 12,000 | 14,000 | 2,000 |

* This estimate is based on current year statistics as reported by the current Register of Deeds Tax File application, and reflects double entry in both the current and the new Tax File systems. The Register of Deeds Office does not yet have functional reporting in the new Tax File system, and is unsure how the new system will track listing activity.

** This estimate assumes completion of the new Tax Listing system installation in 2008, and no double entry of data in 2009.

Vital Statistics

County-Wide Key Strategic Outcome: A county that provides customers with quality programs and services

Program Description

Vital statistics is responsible for the accurate recording and filing of birth, marriage, and death certificates; and issuing certified copies of these certificates. This program also examines all original birth, marriage, and death certificates before processing them to the state. The vital statistics program provides both phone and walk-in reception services for the entire office.

| | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|------------------------------------|-------------------|-------------------|-------------------|-------------------|------------------|
| Staffing (FTE) | 2.00 | 2.00 | 2.00 | 2.00 | 0.00 |
| Charges for Services | \$186,028 | \$185,000 | \$188,000 | \$188,000 | \$3,000 |
| County Tax Levy (Credit)(a) | (\$56,346) | (\$68,178) | (\$68,178) | (\$68,359) | (\$181) |
| Total Revenues | \$129,682 | \$116,822 | \$119,822 | \$119,641 | \$2,819 |
| Personnel Costs | \$89,668 | \$94,379 | \$93,351 | \$96,975 | \$2,596 |
| Operating Expenses | \$4,137 | \$5,176 | \$6,952 | \$6,745 | \$1,569 |
| Interdept. Charges | \$14,913 | \$17,267 | \$17,261 | \$15,921 | (\$1,346) |
| Total Expenditures | \$108,718 | \$116,822 | \$117,564 | \$119,641 | \$2,819 |
| Rev. Over (Under) Exp. | \$20,964 | - | \$2,258 | - | - |

(a) Revenues in excess of expenditures are used to offset tax levy funding required for other county general fund operations.



Program Highlights

Charges for Service revenues increases by \$3,000 or 1.6% based on current year activity for vital record copies. Tax levy for this program area decreases by \$181 to \$68,359.

Personnel costs increase by \$2,596, reflecting cost to continue for 2.00 FTE employees. Operating expenses increase \$1,569 due to software licensing fees for touch screen access for vital records being appropriately assessed to this program area. Interdepartmental charges decrease by \$1,346 to \$15,921 due to \$1,811 decrease in postage costs based on past expenditure levels; removal of Optica charges resulting in a \$520 reduction as these charges are now captured as part of the End User Technology fund budget; and \$94 reduction in telephone charges. These decreases are partially offset by \$912 increase in End User Technology charges mainly due to the phasing in of full cost allocations from the End User Technology Fund to user departments' budget from the new charging methods, as recommended by Internal Audit, to better reflect the cost of technology resources used by departments. For expenditure charge increases above 3%, tax levy funding is being shifted from End User Technology Fund to the departments.



| Activity | 2007 Actual | 2008 Budget | 2008 Estimate | 2009 Budget | Budget Change |
|--|----------------|----------------|------------------|----------------|------------------|
| Number of Certificates Filed | | | | | |
| Birth | 5,960 | 7,100 | 7,000 | 7,100 | 0 |
| Death | 2,325 | 3,900 | 3,700 | 3,900 | 0 |
| Marriage | 1,993 | 3,500 | 2,400 | 2,700 | (800) |
| Number of Certified Copies Issued | | | | | |
| Birth | 11,376 | 12,000 | 12,000 | 12,000 | 0 |
| Death | 34,359 | 30,500 | 33,000 | 32,000 | 1,500 |
| Marriage | 6,254 | 6,500 | 6,500 | 6,500 | 0 |